



## **WIOA COMMITTEE**

GoToMeeting® 11:00 – 1:00 PM  
Tuesday, March 13, 2017  
Walt Sullivan Building, Helena, MT

**MEMBERS PRESENT:** Commissioner Jane Weber (Chair); Casey Blumenthal; Katie Madsen; Paul Hopfauf; Commissioner Mike McGinley

**STAFF:** Shannon Lewis, Jenny Harris

**CALL TO ORDER/ROLL CALL:** Chair Weber called the meeting to order at 11:00.

**ROLL CALL:** Shannon Lewis conducted roll call and established a quorum.

**AGENDA:** Chair Weber asked for a motion to approve the agenda.

***Ms. Blumenthal moved, and Mr. Hopfauf seconded a motion to approve the agenda.***

***The motion carried.***

**AGENDA:** Chair Weber asked for a motion to approve the December 14, 2017 meeting minutes.

***Ms. Blumenthal moved, and Mr. Hopfauf seconded a motion to approve the December 14, 2017 meeting minutes.***

***The motion carried.***

### **NEW BUSINESS:**

**ONE-STOP OPERATOR RFP:** Ms. Lewis discussed the One-Stop Operator RFP and the process the RFP will go through in order to procure a new One-Stop Operator. Ms. Blumenthal and Chair Weber will review and finalize the language in the scoring template on behalf of the committee before final submission to the Department of Administration for its work getting the RFP into the eMACS system for the release of the RFP.

Chair Weber asked for a motion to approve the release of the RFP for bidders.

***Ms. Blumenthal moved and Mr. McGinley seconded a motion to approve the RFP for release to bidders.***

***The motion carried.***

### **ADULT AND DISLOCATED WORKER POLICY:**

Ms. Harris reviewed the Adult and Dislocated Worker Policy with the committee and answered questions about the policy. This policy outlines applies to all service

providers, fiscal officers, and the WIOA monitoring team administering WIOA Title I Adult and Dislocated Worker programs.

The committee discussed the value of defining terms within the policy, including:

- Termination of Employment;
- Notice of Termination;
- Public/General Announcement; and
- Unlikely to Return to a Prior Occupation or Industry;

The committee agreed that since the definitions for the above-listed terms are not included in prior policy and it doesn't create an issue for providers and program administrators that there is no value in defining the terms in current policy.

***Mr. McGinley moved and Mr. Hopfauf seconded a motion to approve the Title I Adult and Dislocated Worker Program Policy without defining:***

- ***Termination of Employment;***
  - ***Notice of Termination;***
  - ***Public/General Announcement; and***
  - ***Unlikely to Return to a Prior Occupation or Industry.***
- The motion carried.***

#### **FINAL POLICY LANGUAGE:**

Dislocated Worker Priority of Service:

- Plant closures or significant dislocation events are given priority for Individualized Career and Training services. All other eligible individuals impacted are considered of equal status for receipt of services not withstanding federal requirements pertaining to priority for covered persons (veterans and eligible spouses).
- Service Priority for Dislocated Workers are as follows:
  - Termination of employment;
  - Notice of Termination;
  - Public/General Announcement; and
  - Unlikely to return to a prior occupation or industry.

***Ms. Blumenthal moved and Mr. Hopfauf seconded a motion to approve the Title I Adult and Dislocated Worker Program Policy.***

***The motion carried.***

#### **FAMILY SIZE AND INCOME DETERMINATION POLICY:**

Ms. Harris walked the Committee through the Family Size and Income Determination Policy, which reflects the guidance issued by the U.S. Department of Labor. The policy applies to all service providers operating WIOA Title I programs and WIOA Title I program managers.

***Mr. Hopfauf moved and Mr. McGinley seconded a motion to approve the Family Size and Income Determination Policy.***

***The motion carried.***

### **INDIVIDUAL TRAINING ACCOUNTS POLICY:**

Ms. Harris discussed the Individual Training Accounts Policy with the committee and discussed a number of options for the committee on the duration, cost limits, and availability of the accounts. The WIOA Committee agreed to continue offering no monetary limit or cap on the accounts, nor pose a limit on the length of the training as this has not caused a problem for service providers.

***Mr. Hopfauf moved and Ms. Blumenthal seconded a motion to approve the policy allowing participants to maintain Individual Training Accounts without a monetary or time limit on the accounts.***

***The motion carried.***

### **FINAL POLICY LANGUAGE:**

**Duration, Cost Limits, and Availability:**

- There is no monetary limit or cap on ITAs; nor is there a limit on the length of the training. Service providers shall keep in mind that the intent of WIOA is to get clients training and into the workforce as quickly as possible. Training that can be completed within a few years or even shorter timeframe is the standard expectation. If a client is requesting a longer training program, service providers shall consult with a program manager. Service providers are to base the amount of the ITAs and duration of the training on each eligible client's needs and circumstances and the availability of program funds; with the goal to service as many individuals as possible with the funding available.
- ITAs are awarded per semester, quarter, or for uninterrupted training coursework. Second and subsequent ITAs will be awarded only for continuing classes in the educational or training institution initially attended, unless there is mutual and justifiable agreement between the service provider and the client that another training institution or training program is necessary.
- An individual who has been determined eligible for an ITA may select a training institution and program from the ETPL or from another state, provided that the training institution and program is listed on that state's ETPL, after consultation with a case manager or career planner. Unless the program has exhausted funds for the program year, the service provider must refer the individual to the selected training program, and establish an ITA for the individual to pay for training.

Ms. Harris also provided the committee with options for provisions of allowing participants to retake classes, as there are times that a participant may need to retest in order to advance in their training program. The committee agreed that there is value in allowing participants the option to retake classes or tests.

***Ms. Blumenthal moved and Ms. Madsen seconded a motion to approve the policy allowing participants to retake classes and coursework.***

***The motion carried.***

### **FINAL POLICY LANGUAGE:**

**Retakes of Required Classes:**

- WIOA funds may be used to pay for retakes of required classes if there is sufficient justification that has been documented by the case manager.

Justifiable reasons to pay for a retake may include: Requirement to attain a specific grade to advance to higher level coursework in the training program; or circumstances beyond the client's control such as an unforeseen health issue. Service providers shall consult with a program manager if they are uncertain about funding a specific retake request.

***Mr. Hopfauf moved and Ms. Blumenthal seconded a motion to approve the Individual Training Accounts Policy.  
The motion carried.***

#### **JMG OVERSIGHT COMMITTEE:**

Chair Weber discussed the possibility of forming a JMG Oversight Committee under the WIOA Committee to alleviate some of the work of the WIOA Committee. The JMG Oversight Committee would meet quarterly and receive updates from the JMG program and then report out to the full SWIB at its winter and summer meetings. Mr. Hopfauf agreed to chair the committee and WIOA Committee members will send possible names to Ms. Lewis to begin building the committee.

***Mr. McGinley moved and Ms. Blumenthal seconded a motion to form a JMG Oversight Committee under the WIOA Committee.  
The motion carried.***

#### **SUMMER POLICY MEETING:**

Ms. Lewis discussed the option of the WIOA Committee coming together in July for an in-person meeting to wrap up its work on policy approval. There are currently 12 outstanding policies that need to go through the committee and the committee must finalize its policy work before taking up additional obligations and priorities. The committee agreed to meet in July after the full SWIB meeting to finalize its policy work. Committee members will email Ms. Lewis any dates that they are unavailable during the month of July and she will begin scheduling.

#### **ADJOURNMENT:**

Chair Weber adjourned the meeting at 12:40 PM.